MyChoice® Accounts Transition Communications Guide

**Document Summary**
Use this guide to send informative emails to employees regarding the transition of their savings and spending accounts to MyChoice Accounts.

**Primary Audience**
Clients, Members

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# Overview of MyChoice Accounts Transition Communications Guide

## Guide Overview

This guide provides content that can be used by Businessolver clients to inform and educate their employees on the transition of their savings and spending accounts to MyChoice Accounts. The provided content is customizable by the client, as indicated by anything in bold brackets.

Note For additional client-facing resources that help client admins and members make the most of MyChoice Accounts, see the [Tech with Heart Resources](https://www.businessolver.com/tech-with-heart-resources/) site.

### Member/Dependent Preferred Names

If the client has opted in to use preferred names for members and/or dependents, email templates will use preferred names by default when available. RTF/PDF templates will use legal names by default (“Legal Name Override” checkbox selected). For more info, see [How to Set Up Preferred Names for Members and Dependents](https://bsolver.sharepoint.com/%3Aw%3A/r/sites/OmniToolbox/Shared%20Documents/How%20to%20Set%20Up%20Preferred%20Names%20for%20Members%20and%20Dependents.docx?d=wf366714fe41f49548bec57bf51870f5a&csf=1&web=1&e=JUzr6e).

## How to Use the Guide

This guide contains content for all stages of your transition to MyChoice Accounts. Follow the steps below to locate and create your employee communications.

1. Locate and click on the communication you need in the Table of Contents.
2. Copy and paste the content into your communication template, such as an email.
3. Update any content in **[bold brackets]** to align to your situation. (e.g., important dates, contribution limits, etc.)
4. Send to your employees via your chosen communication method.

**Note:** The email communications in this guide are templates that cover most scenarios. Please thoroughly review your template and align it to your plan design. Including dates and provisions your company may have in place.

# HSA Communications

## New HSA Provider Email

**Audience:** Employees enrolled in an HSA

**Subject:** Your HSA Administrator Is Changing in **[MONTH YEAR]**

**Headline:** Your **[Company]** Health Savings Account Is Moving to MyChoice® Accounts

**Body:**

Hello [[member\_fname]],

**[Company]** is excited to announce that it has partnered with MyChoice Accounts to take over administration of Health Savings Accounts (HSAs), effective **[PLAN YEAR START DATE]**.

**Why the change?**

The switch from **[PRIOR VENDOR]** to MyChoice Accounts will allow you to manage your HSA from the same platform where you enroll in your other benefits, **[Portal Name or URL]**. No more signing in and out of multiple websites—you can do it all from the same place.

With MyChoice, you’ll be able to:

* Check your HSA balance.
* Submit claims for reimbursement and track the status of those claims.
* Connect your bank account to get reimbursed faster.
* Pay providers directly from the account—you can even set up recurring payments!
* You can also pay providers, or [purchase HSA-eligible expenses](https://www.businessolver.com/mychoice-accounts/participants/hsa-eligible-expense/), using your new MyChoice Accounts Visa® debit card.
* Invest your HSA funds, once your balance hits a minimum threshold amount.
* Access and manage your account from **[Portal Name or URL]** or from the MyChoice® benefits app.

**What do I need to do?**

In the coming weeks, you will receive additional information regarding the transfer of your HSA. This will include (but is not limited to) information about providing your consent to transfer your current account. **Please note:** If you do not consent to the transfer, your HSA will remain with **[PRIOR VENDOR]**. While you can continue to use this account, you will no longer be able to make payroll contributions to the account. You will also be responsible for any administration fees charged by **[PRIOR VENDOR]**.

Additionally, during this year’s **[Annual/Open Enrollment]**, you will be required to re-enroll in your HSA, if eligible.

**Important dates**

**[Add HSA Transfer Timeline dates, including any lockout periods and when the new account will include the old HSA balance]**

**Stay tuned for more information!**

Keep an eye on your inbox over the next few weeks to learn more about the HSA transfer and what it means to you. We appreciate your patience as we work through the process and are excited for everything MyChoice Accounts has to offer! In the meantime, learn more about [MyChoice Accounts and the benefits of having an HSA](https://www.businessolver.com/mychoice-accounts/participants/health-savings-account/).

**[HR/Benefits Team Closing]**

## Enroll in an HSA Email

**Audience:** Employees NOT enrolled in an HSA

**Subject:** Save Money on Healthcare Expenses with an HSA

**Headline:** Enroll in a Health Savings Account

**Body:**

Hello [[member\_fname]],

It’s **[Annual/Open Enrollment]** and we’d like to remind you that you are eligible to enroll in a Health Savings Account (HSA) if you elect a high-deductible health plan (HDHP).

**How does an HSA work?**

An HSA allows you to set aside money from your paycheck before you pay taxes on it, which helps you lower your tax responsibility at the end of the year. You can use an HSA to pay for things like co-pays, lab fees, and other [HSA-eligible expenses](https://www.businessolver.com/mychoice-accounts/participants/hsa-eligible-expense/).

Additionally, once your HSA balance hits a minimum threshold amount, you can invest some of the funds so that you can grow the account to use for future eligible expenses—even into your retirement!

**And don’t forget:** You never lose your HSA, even if you leave **[Company]**. If there is a balance in the account, you can continue to use it!

**Meet MyChoice® Accounts**

Beginning **[PLAN YEAR START DATE]**, MyChoice Accounts will be the new administrator for the **[Company]** HSA. This allows you to manage your HSA from the same platform where you enroll in your other benefits, **[Portal Name or URL]**. No more signing in and out of multiple websites—you can do it all from the same place.

With MyChoice, you’ll be able to:

* Check your HSA balance.
* Submit claims for reimbursement and track the status of those claims.
* Connect your bank account to get reimbursed faster.
* Pay providers directly from the account—you can even set up recurring payments!
* You can also pay providers, or [purchase HSA-eligible expenses](https://www.businessolver.com/mychoice-accounts/participants/hsa-eligible-expense/), using your new MyChoice Accounts Visa® debit card.
* Invest your HSA funds, once your balance hits a minimum threshold amount.
* Access and manage your account from **[Portal Name or URL]** or from the MyChoice® benefits app.

**What do I need to do?**

If you want to enroll in an HSA, you will need to enroll in an HDHP. You will also be required to verify your identity to set up the account.

If you have other questions about HSAs, or just want to learn more, review the [MyChoice Accounts website](https://www.businessolver.com/mychoice-accounts/participants/health-savings-account/).

So, what are you waiting for? Enroll in an HSA today!

**[HR/Benefits Team Closing]**

## HCFSA to LPFSA Email (w/ Carryover)

**Audience:** Employees enrolled in an HSA who previously had an HCFSA

**Subject:** IMPORTANT: Changes Are Coming to Your Healthcare FSA

**Headline:** Your Healthcare FSA Is Converting to a Limited Purpose FSA

**Body:**

Hello [[member\_fname]],

Congratulations on enrolling in a Health Savings Account (HSA) for **[YEAR]**! We think you’ll find it a valuable tool to help you pay for your eligible medical expenses while also saving money.

However, we also noticed that you have a Healthcare Flexible Spending Account (HCFSA) for **[CURRENT YEAR]**. Based on current IRS guidelines, you can roll over **[FSA Rollover Amount]** to **[Year]**. But the IRS also prevents you from having both an HCFSA and an HSA at the same time. Therefore, we will be converting your HCFSA to a Limited Purpose Flexible Spending Account (LPFSA), which can only be used for dental and vision expenses.

If you have any money left in your **[CURRENT YEAR]** HCFSA on the last day of the plan year, we’ll automatically open a LPFSA for you on **[PLAN YEAR START DATE]**.

**Pro tip:** Spend down your HCFSA balance by **[PLAN YEAR END DATE]** and you won’t have to worry about rollover amounts or account conversions at all! For an easy FSA spend-down experience, check out the [FSA Store’s end of year guide](https://fsastore.com/fsa-spending-deadline-guide?utm_source=Businessolver&utm_medium=TPA+Newsletter+Link&a_aid=5bf468aa5c776&utm_campaign=TPA+Partner). All items at the FSA Store are FSA-eligible.

If you have any questions about the transition, please feel free to reach out to your **[Benefits Team]** at **[CONTACT INFO]**.

**[HR/Benefits Team Closing]**

## HCFSA to HSA Email (no LPFSA)

**Audience:** Employees enrolled in an HSA who previously had an HCFSA

**Subject:** IMPORTANT: Spend Down Your FSA to Enroll in Your HSA

**Headline:** Be Sure to Spend Your FSA Funds Before **[DATE]**

**Body:**

Hello [[member\_fname]],

Congratulations on enrolling in a Health Savings Account (HSA) for **[YEAR]**! We think you’ll find it a valuable tool to help you pay for your eligible medical expenses while also saving money.

However, we also noticed that you have a Healthcare Flexible Spending Account (HCFSA) for **[CURRENT YEAR]**. Based on current IRS guidelines, you can roll over **[FSA Rollover Amount]** to **[Year]**. But the IRS also prevents you from having both an HCFSA and an HSA at the same time. To ensure a smooth transition into your **[YEAR]** benefits, you should spend down all your available HCFSA funds by **[PLAN YEAR END DATE]**. If there are any funds left in the account as of **[PLAN YEAR END DATEDATE]**, you will be unable to open an HSA until **[DATE]**.

**Pro tip:** For an easy FSA spend-down experience, check out the [FSA Store’s end of year guide](https://fsastore.com/fsa-spending-deadline-guide?utm_source=Businessolver&utm_medium=TPA+Newsletter+Link&a_aid=5bf468aa5c776&utm_campaign=TPA+Partner). All items at the FSA Store are FSA-eligible.

If you have any questions about the transition, please feel free to reach out to your **[Benefits Team]** at **[CONTACT INFO]**.

**[HR/Benefits Team Closing]**

## HCFSA to HSA Email (w/ Grace Period)

**Audience:** Employees enrolled in an HSA who previously had an HCFSA

**Subject:** IMPORTANT: Spend Down Your FSA to Enroll in Your HSA

**Headline:** Be Sure to Spend Your FSA Funds Before **[DATE]**

**Body:**

Hello [[member\_fname]],

Congratulations on enrolling in a Health Savings Account (HSA) for **[YEAR]**! We think you’ll find it a valuable tool to help you pay for your eligible medical expenses while also saving money.

However, we also noticed that you have a Healthcare Flexible Spending Account (HCFSA) for **[YEAR]**. The IRS prevents you from having both an HCFSA and an HSA at the same time. To ensure a smooth transition into your **[YEAR]** benefits, you should spend down all your available HCFSA funds by **[PLAN YEAR END DATE]**.

If there are any funds left in the account as of **[PLAN YEAR END DATE]**, you can still submit claims for reimbursement through **[GRACE PERIOD CUTOFF DATE]**. However, that means your HSA won’t be active until **[DATE]**.

**Pro tip:** For an easy FSA spend-down experience, check out the [FSA Store’s end of year guide](https://fsastore.com/fsa-spending-deadline-guide?utm_source=Businessolver&utm_medium=TPA+Newsletter+Link&a_aid=5bf468aa5c776&utm_campaign=TPA+Partner). All items at the FSA Store are FSA-eligible.

If you have any questions about the transition, please feel free to reach out to your **[Benefits Team]** at **[CONTACT INFO]**.

**[HR/Benefits Team Closing]**

## Transfer & Consent Email

**Audience:** Employees enrolled in an HSA

**Subject:** ACTION NEEDED: Consent to Transfer Your HSA Today

**Headline:** Save the Fees: Move Your HSA to MyChoice® Accounts

**Body:**

Hello [[member\_fname]],

**Don’t miss this important opportunity to consolidate and grow your Health Savings Account (HSA)—and avoid paying any additional administrative fees.**

We recently announced that we are moving administration of **[Company]** HSAs to MyChoice Accounts from **[PRIOR VENDOR]**. Because you currently have an HSA with **[PRIOR VENDOR]**, we need your consent to transfer your HSA balance to MyChoice Accounts.

**Why should I transfer my HSA?**

When you have multiple HSAs open, you run the risk of losing valuable funds to administrative fees and missing out on account growth through interest and/or investments. Additionally, after **[MyChoice Accounts Effective Date]**, you will no longer be able to make pre-tax payroll contributions to the **[PRIOR VENDOR]** HSA.

**Please note:** If you have invested some of your HSA balance with **[PRIOR VENDOR]**, you will need to liquidate, or sell, those investments prior to the transfer date. See below for important transfer timeline dates.

**Meet MyChoice Accounts**

Beginning **[Date]**, MyChoice Accounts will be the new administrator for the **[Company]** HSA. This allows you to manage your HSA from the same platform where you enroll in your other benefits, **[Portal Name or URL]**. No more signing in and out of multiple websites—you can do it all from the same place.

With MyChoice, you’ll be able to:

* Check your HSA balance.
* Submit claims for reimbursement and track the status of those claims.
* Connect your bank account to get reimbursed faster.
* Pay providers directly from the account—you can even set up recurring payments!
* You can also pay providers, or [purchase HSA-eligible expenses](https://www.businessolver.com/mychoice-accounts/participants/hsa-eligible-expense/), using your new MyChoice Accounts Visa® debit card.
* Invest your HSA funds, once your balance hits a minimum threshold amount.

**What do I need to do?**

To ensure an orderly transfer process, consent to transfer your HSA by **[Consent Due Date]**. Also be sure you have liquidated any invested HSA funds by **[Liquidation Due Date]**. See below for other important transfer timeline dates.

Follow these steps to consent to transfer your HSA to MyChoice Accounts by **[Consent Due Date]**:

1. Log in to **[Portal Name or URL]**.
2. Select **[XXX]**.
3. Agree to the UMB Terms and Conditions. (UMB is the custodial bank for MyChoice Accounts.)
4. Consent to have your HSA balance with **[PRIOR VENDOR]** transferred to MyChoice Accounts.

**What happens if I don’t consent?**

1. You could be charged a monthly administrative fee, which will be deducted from your HSA with **[PRIOR VENDOR]**.
2. If you opt to close and transfer your **[PRIOR VENDOR]** HSA at a later date, you may be charged an account closure fee.

**Important dates**

**[Add HSA Transfer Timeline dates, including any lockout periods and when the new account will include the old HSA balance]**

To learn more about MyChoice Accounts, review the [MyChoice Accounts website](https://www.businessolver.com/mychoice-accounts/participants/health-savings-account/).

**[HR/Benefits Team Closing]**

## Transfer & Consent Email Reminder

**Audience:** Employees enrolled in an HSA who have not yet consented to transfer

**Subject:** REMINDER: Consent to Transfer Your HSA by **[Consent Due Date]**

**Headline:** Don’t Forget to Move Your HSA to MyChoice® Accounts

**Body:**

Hello [[member\_fname]],

**Don’t miss this important opportunity to consolidate and grow your Health Savings Account (HSA)—and avoid paying any additional administrative fees.**

We recently announced that we are moving administration of **[Company]** HSAs to MyChoice Accounts from **[PRIOR VENDOR]**. Because you currently have an HSA with **[PRIOR VENDOR]** and haven’t yet provided your consent to transfer that balance, we’d like to remind you that **action is needed**.

**What do I need to do?**

To ensure an orderly transfer process, consent to transfer your HSA by **[Consent Due Date]**. Also be sure you have liquidated any invested HSA funds by **[Liquidation Due Date]**. See below for other important transfer timeline dates.

Follow these steps to consent to transfer your HSA to MyChoice Accounts by **[Consent Due Date]**:

1. Log in to **[Portal Name or URL]**.
2. Select **[XXX]**.
3. Agree to the UMB Terms and Conditions. (UMB is the custodial bank for MyChoice Accounts.)
4. Consent to have your HSA balance with **[PRIOR VENDOR]** transferred to MyChoice Accounts.

**What happens if I don’t consent?**

1. You could be charged a monthly administrative fee, which will be deducted from your HSA with **[PRIOR VENDOR]**.
2. If you opt to close and transfer your **[PRIOR VENDOR]** HSA at a later date, you may be charged an account closure fee.

**Important dates**

**[Add HSA Transfer Timeline dates, including any lockout periods and when the new account will include the old HSA balance]**

To learn more about MyChoice Accounts, review the [MyChoice Accounts website](https://www.businessolver.com/mychoice-accounts/participants/health-savings-account/).

**[HR/Benefits Team Closing]**

## HSA Balance Is Transferring Soon Email (optional)

**Audience:** Employees enrolled in an HSA who have consented to transfer

**Subject:** Your **[PRIOR VENDOR]** HSA Balance Is Transferring to MyChoice Accounts Soon

**Headline:** Be Aware of Important Dates Regarding Your HSA Transfer

**Body:**

Hello [[member\_fname]],

As part of our recently announced transition to MyChoice® Accounts, we will soon begin transferring your Health Savings Account (HSA) balance from **[PRIOR VENDOR]** to MyChoice Accounts. Keep the following dates in mind as you start planning how to use your new HSA.

**Your [PRIOR VENDOR] balance will be locked out from [DATE-DATE]**

Once we begin the transfer process, any remaining balance you have with **[PRIOR VENDOR]** will be unavailable until after the transfer is completed. This means that from **[DATE to DATE]**, you will not be able to spend your HSA funds. After the transfer period ends on **[DATE]**, those funds will again be available and you can log in to **[Portal Name or URL]**, or the MyChoice® benefits app, to see your updated balance.

**What if I have eligible medical expenses during the lockout period?**

If you have eligible medical expenses during the lockout period, you can pay out of pocket and then submit a claim for reimbursement after the lockout ends. You can also use any available balance in your MyChoice Accounts HSA, either by paying with your MyChoice Accounts Visa® debit card, submitting a claim, or paying a provider directly from the account.

To learn more about MyChoice Accounts, including which medical expenses are HSA-eligible, review the [MyChoice Accounts website](https://www.businessolver.com/mychoice-accounts/participants/health-savings-account/).

**[HR/Benefits Team Closing]**

## HSA Funds Are Available Email (optional)

**Audience:** Employees enrolled in an HSA who have consented to transfer

**Subject:** Your Full HSA Balance Is Now Available at MyChoice® Accounts

**Headline:** Start using your Health Savings Account today!

**Body:**

Hello [[member\_fname]],

**Good news!** We have successfully transferred your Health Savings Account (HSA) balance from [**PRIOR VENDOR]** to MyChoice Accounts. You can now begin using your consolidated balance to pay for [eligible medical expenses](https://www.businessolver.com/mychoice-accounts/participants/hsa-eligible-expense/). Access your account at **[Portal Name or URL]** or via the MyChoice® benefits app, available for iOS and Android.

**Want to make your HSA work harder for you?**

HSAs are valuable tools to help you pay for your current eligible medical expenses. But did you know that you can invest your HSA? By investing your HSA, you can grow your account so that you can cover not only your current medical expenses, but your future expenses as well!

Learn more about the benefits of investing your HSA and how to get started on the [MyChoice Accounts HSA Investing website](https://www.businessolver.com/mychoice-accounts/participants/hsa-investments/).

**[HR/Benefits Team Closing]**

**Disclaimer:** All investments are self-directed, and MyChoice Accounts is unable to provide investment guidance. Investments in exchange-traded funds (ETFs) are not FDIC insured, not bank issued or guaranteed, and are subject to risk, including fluctuations in value and the possible loss of the principal amount invested. Please consult your financial planner for more information. As with all investments, please review the fund prospectuses as they include investment objectives, risks, fees, expenses, and other information that one should read and consider carefully before investing.

# FSA Communications

## Adding FSA Carryover

**Audience:** Employees enrolled in an FSA

**Subject:** IMPORTANT: Changes Are Coming to Your FSA

**Headline:** Now You Can Carry Over Your FSA Balance

**Body:**

Hello [[member\_fname]],

At **[company]**, we believe in supporting your financial goals through your benefits program. We understand that every dollar counts and that your healthcare is worth funding. To that end, we have made a significant change to your Healthcare Flexible Spending Account (HCFSA) to support your health and wealth.

Effective **[DATE]**, your HCFSA will include a carryover provision. This means your unused HCFSA balance at the end of the plan year will be carried over into your **[YEAR]** account, up to the carryover limit allowed by the IRS. Note: The IRS carryover limit for **[YEAR]** is **[$XXX]**.

**Maximize Your HCFSA Today and in the Future**

1. **Spend down to [carryover limit] or less by December 31.** It’s a good time to stock up your medicine cabinet if you have more than **[carryover limit]** in your HCFSA. You can purchase items like feminine hygiene products, cough/cold medications, humidifiers, pain relievers, and first aid supplies. Here’s a [**list of eligible items**](https://www.businessolver.com/mychoice-accounts/participants/fsa-hra-eligible-expense) and a [**spend-down guide**](https://fsastore.com/fsa-spending-deadline-guide?utm_source=Businessolver&utm_medium=TPA+Newsletter+Link&a_aid=5bf468aa5c776&utm_campaign=TPA+Partner) provided by the FSA Store, where everything for sale is FSA-eligible.
2. **Remember that ANY funds above [carryover limit] will be forfeited if you do not spend them.** Yikes! You don’t want to lose your hard-earned money. You still have until **[DATE]**, to submit claims for any eligible items or services you paid for during **[YEAR]**. So, if you paid out-of-pocket for prescriptions, over-the-counter medications, glasses, contacts, or any other FSA-eligible item, be sure to submit your claims by **[DATE]**.
3. **Mobile-ize to make it easier!** Using the MyChoice® benefits app makes managing your HCFSA so much easier. View your account details on the go, take photos of your receipts to submit claims—all in the app! Download the app from the [**iOS App Store**](https://www.businessolver.com/cs/c/?cta_guid=12874e62-d272-4f08-b326-72fabaaba3ae&placement_guid=8f1f5b01-6506-4813-9c7e-d2f8119cb2bd&portal_id=378546&redirect_url=APefjpHYOC6SOFxA1lygy1q8W8kUlRp8YLl81LX5MPxfiX6gatXGZ1atQ1wmIDHBFNUe_Q4Ycguqp44TYE8qPFv7lsve045OLYSwk7kj5U_IQxOIEG_dp2FAEUSEWsuli7P16Xc8q0pPAxJ2CXW131XT9dyO13DbtWFSq0lI_03Xj4te1F2UBeBV_wqWdSdod9QC_9zDKzN6oDMgZp9ubQEiw5YaQe91Eyf2mQKfP9w1qRRQHbsBik50nw2VXRMn-hUZcSYnhEvq0jrAg374IMa_CV8HERtPa7lCgctzu5lO_X9TZnL4iKNqmuUQZd0FRHWHGUYxHSOP&hsutk=bf1235f872e6ad2dd3e972fffdb6d3b7&canon=https%3A%2F%2Fwww.businessolver.com%2Fwhat-we-do%2Ftools%2Fmychoicemobileapp&click=8c41cf64-68f4-446f-a259-d4132366043b&utm_referrer=https%3A%2F%2Fwww.businessolver.com%2F&pageId=5039852061&__hstc=244580634.bf1235f872e6ad2dd3e972fffdb6d3b7.1506458608829.1509571645043.1509632214735.22&__hssc=244580634.2.1509632214735&__hsfp=1203295148) or the [**Android Google Play Store**](https://play.google.com/store/apps/details?id=com.businessolver.mychoice&__hssc=244580634.1.1509632214735&__hstc=244580634.bf1235f872e6ad2dd3e972fffdb6d3b7.1506458608829.1509571645043.1509632214735.22&__hsfp=1203295148&hsCtaTracking=653cd3e0-9051-4b1d-bba6-3cab5d849aa8%7C241bd874-4611-4a52-9506-401266611c65). Use the same credentials you use for your online portal or follow the instructions to create a login. You can also log in by going to **[PORTAL NAME OR URL]** and clicking **Access the App**.

Get help! If you need help understanding how to submit claims or what to do with your HCFSA, check out the [**MyChoice Accounts FSA website.**](https://www.businessolver.com/mychoice-accounts/participants/flexible-spending-account)

If you have any questions about the carryover change, please feel free to reach out to your **[Benefits Team]** at **[CONTACT INFO]**.

**[HR/Benefits Team Closing]**

## Transition to MyChoice Accounts and Benefitsolver

**Audience:** Employees enrolled in a savings or spending account

**Subject:** IMPORTANT: Changes Are Coming to Your Savings and Spending Accounts

**Headline:** Access Your Accounts and Your Benefits in One Place!

**Body:**

Hello [[member\_fname]],

Saving money for your current and future healthcare expenses is a smart financial decision. To help you get the most out of your healthcare dollars, we’ve partnered with MyChoice® Accounts to offer you more tools and educational resources, with your needs and goals in mind.

As we recently announced, we are also partnering with a new benefits administration provider, Businessolver. Through its enrollment platform, you can also access all your savings and spending account information.

**Pro tip:** Download the MyChoice® benefits app to access your benefits and accounts, all from the palm of your hand!

From the new benefits platform, you can:

* Access all your account details, sign up for direct deposit, order additional cards, and manage account actions.
* Submit a request for reimbursement.
* Use your new MyChoice Accounts Visa® debit card for all your eligible healthcare expenses.

Depending on the kind of account you have and its rules, there may be year-end details you’ll need to know about. Look for another email with that information! In the meantime, continue using your account as usual.

We look forward to sharing more with you soon.

**[HR/Benefits Team Closing]**

## Reminder w/o Carryover or Grace Period

**Audience:** Employees enrolled in an FSA

**Subject:** REMINDER: Changes Are Coming to Your FSA

**Headline:** Don’t forget to spend down your FSA by December 31!

**Body:**

Hello [[member\_fname]],

A few weeks ago, we sent a notice to tell you about the enhancements and changes to your Healthcare Flexible Spending Account (FSA) that will make using your account easier. As a reminder, beginning January 1, you’ll have access to all your benefits and FSA information in one place through our benefits portal at **[[companyurl]]**. You can also download the MyChoice® benefits app to see that information from your mobile device.

To make these enhancements, we’re working behind the scenes to improve the experience for you.

Here’s what you need to know.

1. To avoid forfeiting any remaining **[YEAR]** FSA balance, **submit any outstanding medical expenses for reimbursement no later than the end of the plan year**. Follow the current process for reimbursements or use your existing debit card.
2. **You’ll receive your new MyChoice Account Visa® debit card by [DATE]** to use for all eligible **[YEAR]** healthcare expenses. With this new card, you’ll be able to easily manage all your savings and spending accounts.
3. **On [PLAN YEAR END DATE], any existing debit cards will be deactivated.** Since you’ll be getting a new card, please destroy the old card once it’s been deactivated.
4. **Starting [PLAN YEAR START DATE]**, **you can manage all [YEAR] reimbursements right in your benefits portal or from the MyChoice benefits app**, and you can begin using your new MyChoice Accounts debit card for eligible expenses.

We’ll be in touch soon with final details.

**[HR/Benefits Team Closing]**

## Reminder w/ Carryover

**Audience:** Employees enrolled in an FSA

**Subject:** REMINDER: Changes Are Coming to Your FSA

**Headline:** Don’t forget to spend down your FSA by **[DATE]**!

**Body:**

Hello [[member\_fname]],

A few weeks ago, we sent a notice to tell you about the enhancements and changes to your Healthcare Flexible Spending Account (FSA) that will make using your account easier. As a reminder, beginning **[PLAN YEAR START DATE]**, you’ll have access to all your benefits and FSA information in one place through our benefits portal at **[[companyurl]]**. You can also download the MyChoice® benefits app to see that information from your mobile device.

Here’s what you need to know about your FSA as we make this change:

1. Your current FSA allows you to carry over any remaining balance left in your FSA as of **[PLAN YEAR END DATE]**, up to **[carryover limit]**. Please note that any remaining balance above that amount will be forfeited.

To avoid forfeiting your remaining **[YEAR]** FSA balance, **we recommend submitting any outstanding medical expenses for reimbursements prior to the end of the plan year**. Just follow the current process for reimbursements or use your existing debit card.

1. **You’ll receive your new MyChoice Account Visa® debit card by [DATE], which you can begin using for all FSA-eligible expenses on [DATE].**
2. **On [PLAN YEAR END DATE], any existing debit cards will be deactivated.** Please destroy your old card once it’s deactivated. While you won’t be able to use your old card for new **[YEAR]** claims, you can still file for reimbursement for **[YEAR]** claims through **[PRIOR VENDOR]** by **[Claim End Date]**.

**Use It or Lose It!**

You have until **[CLAIM END DATE]** to submit **[YEAR]** expenses for your FSA. This means we cannot roll any remaining funds into your new MyChoice FSA until after that date. Until then, the money will remain with your **[YEAR]** funds to ensure you can be reimbursed up to your available balance for any eligible **[YEAR]** expenses.

If after **[CLAIM END DATE]** you have funds remaining in your **[YEAR]** FSA, we’ll need to put a short hold on your old account while we transfer those funds over to the new account. This will happen **[DATE]** and typically takes a few days. If you will be affected by this, we’ll send you a reminder before it happens, so you won’t be surprised.

We’ll be in touch with final reminders soon. In the meantime, learn more about [the surprising FSA-eligible items](https://fsastore.com/articles/learn-10-surprisingly-fsa-and-hsa-eligible-items.html?AFID=489865&GroupName=TPA&CID=437559&utm_source=Businessolver&utm_medium=TPA+Email+Proprietary+Link&utm_campaign=TPA+Partner) you can buy!

**[HR/Benefits Team Closing]**

## Reminder w/ Grace Period

**Audience:** Employees enrolled in an FSA

**Subject:** REMINDER: Changes Are Coming to Your FSA

**Headline:** Don’t forget to submit your FSA claims by **[DATE]**!

**Body:**

Hello [[member\_fname]],

A few weeks ago, we sent a notice to tell you about the enhancements and changes to your Healthcare Flexible Spending Account (FSA) that will make using your account easier. As a reminder, beginning **[PLAN YEAR START DATE]**, you’ll have access to all your benefits and FSA information in one place through our benefits portal at **[[companyurl]]**. You can also download the MyChoice® benefits app to see that information from your mobile device.

Here’s what you need to know about your FSA as we make this change:

1. **Your FSA allows you to submit reimbursements for eligible expenses incurred through [GRACE PERIOD END DATE]. You will then have until [CLAIM END DATE] to submit your claims.** For all **[YEAR]** expenses, follow **[PRIOR VENDOR’s]** process to submit reimbursement claims.
2. **Before [PLAN YEAR START DATE], you’ll receive your new MyChoice**® **Account Visa® debit card** to use for your **[YEAR]** FSA-eligible expenses.
3. **On [PLAN YEAR END DATE], any existing debit cards will be deactivated.** Once the debit card is deactivated, please destroy it. Until then, continue to use your account for FSA-eligible expenses.
4. **Starting [PLAN YEAR START DATE]**, **you can manage all [YEAR] reimbursements right in your benefits portal or from the MyChoice benefits app**, and you can begin using your new MyChoice Accounts debit card for eligible expenses.

**Remember:** If you have any eligible expenses before the end of **[YEAR]**, you can use your existing debit card through [PLAN YEAR END DATE] or submit a claim for reimbursement through **[CLAIM END DATE]**. Be sure to spend down your FSA and/or submit any necessary claims by **[CLAIM END DATE]** so you don’t forfeit any **[YEAR]** dollars.

We’ll be in touch with final reminders soon.

**[HR/Benefits Team Closing]**

## Reminder Transfer to HSA w/o Carryover or Grace Period

**Audience:** Employees enrolled in an FSA who are moving into an HSA

**Subject:** REMINDER: Spend Down Your FSA by [DATE]

**Headline:** Don’t forget to submit your FSA claims by **[DATE]**!

**Body:**

Hello [[member\_fname]],

A few weeks ago, we sent a notice to tell you about the enhancements and changes to your Healthcare Flexible Spending Account (FSA) that will make using your account easier. As a reminder, beginning **[PLAN YEAR START DATE]**, you’ll have access to all your benefits and **[YEAR]** FSA in one place through our benefits portal at **[[companyurl]]**. You can also download the MyChoice® benefits app to see that information from your mobile device.

We also noticed that you’ve enrolled in a Health Savings Account (HSA) for **[YEAR]**. That’s great news! An HSA is a great way to set aside money for eligible medical expenses, both for today and in the future. You’ll be receiving more information in the coming weeks about the benefits of having an HSA.

Here’s what you need to know about your FSA as we make the change to MyChoice Accounts:

1. **Submit any outstanding medical expenses prior to the end of the plan year**. Just follow the current process for reimbursements or use your existing debit card. Please plan to spend down your entire **[YEAR]** FSA balance by **[PLAN YEAR END DATE]**.
2. **Before [PLAN YEAR START DATE], you’ll receive your new MyChoice Account Visa® debit card. You can begin using that card** **for all HSA-eligible expenses starting [PLAN YEAR START DATE].**

We’ll be in touch with final reminders soon. In the meantime, learn more about [the surprising FSA-eligible items](https://fsastore.com/articles/learn-10-surprisingly-fsa-and-hsa-eligible-items.html?AFID=489865&GroupName=TPA&CID=437559&utm_source=Businessolver&utm_medium=TPA+Email+Proprietary+Link&utm_campaign=TPA+Partner) you can buy!

**[HR/Benefits Team Closing]**

## Reminder Transfer to HSA w/ Carryover

**Audience:** Employees enrolled in an FSA who are moving into an HSA

**Subject:** REMINDER: Changes Coming to Your FSA in **[YEAR]**

**Headline:** Spend down your FSA by **[DATE]** to ensure a smooth transition to your new HSA

**Body:**

Hello [[member\_fname]],

A few weeks ago, we sent a notice to tell you about the enhancements and changes to your Healthcare Flexible Spending Account (FSA) that will make using your account easier. As a reminder, beginning **[PLAN YEAR START DATE]**, you’ll have access to all your benefits and FSA information in one place through our benefits portal at **[[companyurl]]**. You can also download the MyChoice® benefits app to see that information from your mobile device.

We also noticed that you’ve enrolled in a Health Savings Account (HSA) for **[YEAR]**. That’s great news! An HSA is a great way to set aside money for eligible medical expenses, both for today and in the future. You’ll be receiving more information in the coming weeks about the benefits of having an HSA. However, we want you to be aware of how your FSA will be affected by your new HSA.

Here’s what you need to know about your FSA as we make the change to MyChoice Accounts and you transition to an HSA:

1. Your plan allows you to carry over unused **[YEAR]** FSA dollars, based on carryover limits set by the IRS. For **[YEAR]**, you can carry over **[$XXX]** into **[YEAR]**. However, IRS regulations also prevent you from having both a Healthcare FSA and an HSA at the same time. But, you can have something called a [Limited Purpose FSA](https://www.businessolver.com/mychoice-accounts/participants/limited-purpose-eligible-expense) (LPFSA) that’s used just for dental and vision expenses. It’s recommended that you spend down your FSA by **[PLAN YEAR END DATE]** to ensure you don’t lose any of your FSA dollars and to make the transition to your HSA easier.
2. If you have any money left in your **[YEAR]** Healthcare FSA on **[PLAN YEAR END DATE]**, we’ll automatically open a Limited Purpose FSA for you on **[PLAN YEAR START DATE]**.
3. **Before [PLAN YEAR START DATE], you’ll receive your new MyChoice**® **Account Visa® debit card. You can begin using the new card for HSA- and LPFSA-eligible expenses starting [PLAN YEAR START DATE].**

We’ll be in touch with final reminders soon.

**[HR/Benefits Team Closing]**

Reminder Transfer to HSA w/ Grace Period

**Audience:** Employees enrolled in an FSA who are moving into an HSA

**Subject:** REMINDER: Spend Down Your FSA Dollars by **[DATE]**

**Headline:** Spend down your FSA to ensure a smooth transition to your new HSA

**Body:**

Hello [[member\_fname]],

A few weeks ago, we sent a notice to tell you about the enhancements and changes to your Healthcare Flexible Spending Account (FSA) that will make using your account easier. As a reminder, beginning **[PLAN YEAR START DATE]**, you’ll have access to all your benefits and FSA information in one place through our benefits portal at **[[companyurl]]**. You can also download the MyChoice® benefits app to see that information from your mobile device.

We also noticed that you’ve enrolled in a Health Savings Account (HSA) for **[YEAR]**. That’s great news! An HSA is a great way to set aside money for eligible medical expenses, both for today and in the future. You’ll be receiving more information in the coming weeks about the benefits of having an HSA. However, we want you to be aware of how your FSA will be affected by your new HSA.

Here’s what you need to know about your FSA as we make the change to MyChoice Accounts and you transition to an HSA:

1. Your current FSA includes a grace period that allows you to pay for FSA-eligible expenses through **[GRACE PERIOD END DATE]**. However, that impacts when you can begin using your new HSA, as IRS regulations prevent you from having both a healthcare FSA and an HSA at the same time. **We recommend submitting any eligible expenses prior to the end of the plan year**. Just follow the current process for reimbursements or use your existing debit card. You will want to spend down your full FSA balance by **[PLAN YEAR END DATE]** to be eligible for your new HSA. **Note:** If you don’t spend all your FSA dollars by **[PLAN YEAR END DATE]**, your HSA will not become effective until **[DATE]**.
2. **Before the end of the plan year, you’ll receive your new MyChoice**® **Account Visa® debit card. If you have spent all your FSA dollars, you can begin using that card** **for all HSA-eligible expenses starting [PLAN YEAR START DATE]. Otherwise, you can’t begin using the card until [DATE].**

We’ll be in touch with final reminders soon.

**[HR/Benefits Team Closing]**

Final Reminder w/ Grace Period

**Audience:** Employees enrolled in an FSA

**Subject:** FINAL REMINDER: Submit Your FSA Claims by **[DATE]**

**Headline:** Spend down your FSA to ensure a smooth transition to MyChoice® Accounts

**Body:**

Hello [[member\_fname]],

It’s almost time for you to starting using your new MyChoice Flexible Spending Account (FSA)! We are excited about the updates and opportunities this new experience will provide.

Here are a few reminders about your new FSA account:

1. **You can use [YEAR] FSA dollars for eligible expenses until [PLAN YEAR END DATE].** You can get reimbursed for these expenses until **[GRACE PERIOD END DATE],** following the current reimbursement process.
2. **Before [PLAN YEAR START DATE], you’ll receive your new MyChoice**® **Account Visa® debit card** to use for FSA-eligible expenses in **[YEAR]**.
3. **On [PLAN YEAR END DATE], your [PRIOR VENDOR] debit card will be deactivated.** Please destroy your old card by that date. If you have other **[YEAR]** claims to submit, you will need to do so through **[PRIOR VENDOR]**. All claims should be submitted by **[CLAIM END DATE]**.
4. **Starting [PLAN YEAR START DATE]**, **you can manage your [YEAR] FSA activities right in your benefits portal or from the MyChoice**® **benefits app**. You can also activate and start using your new debit card.

We hope you enjoy this updated account experience. In the meantime, learn more about [the surprising FSA-eligible items](https://fsastore.com/articles/learn-10-surprisingly-fsa-and-hsa-eligible-items.html?AFID=489865&GroupName=TPA&CID=437559&utm_source=Businessolver&utm_medium=TPA+Email+Proprietary+Link&utm_campaign=TPA+Partner) you can buy!

**[HR/Benefits Team Closing]**

## Final Reminder w/o Carryover or Grace Period

**Audience:** Employees enrolled in an FSA

**Subject:** FINAL REMINDER: Spend Your FSA Dollars by December 31

**Headline:** Don’t lose your FSA dollars! Spend down your account by December 31.

**Body:**

Hello [[member\_fname]],

It’s almost time for you to start using your new MyChoice® Flexible Spending Account (FSA)! We are excited about the updates and opportunities this new experience will provide.

Here are a few reminders about your new FSA account:

1. **Spend down your [YEAR] FSA dollars by [PLAN YEAR END DATE].** Any funds remaining in the account as of **[DATE]** will be forfeited.
2. **Before [DATE], you’ll receive your new MyChoice**® **Account Visa® debit card** to use for all **[YEAR]** FSA-eligible expenses. Remember, you must activate your card and establish a PIN.
3. **On [PLAN YEAR END DATE], any existing debit cards will be deactivated.** Please destroy your old card by **[DATE]**.
4. **Starting [PLAN YEAR START DATE],** **you can manage all FSA activities right in your benefits portal or from the MyChoice® benefits app.** Once activated, you can begin using your new MyChoice Account debit card for FSA-eligible expenses.

We hope you enjoy this updated account experience. In the meantime, learn more about [the surprising FSA-eligible items](https://fsastore.com/articles/learn-10-surprisingly-fsa-and-hsa-eligible-items.html?AFID=489865&GroupName=TPA&CID=437559&utm_source=Businessolver&utm_medium=TPA+Email+Proprietary+Link&utm_campaign=TPA+Partner) you can buy!

**[HR/Benefits Team Closing]**

## Final Reminder w/ Carryover

**Audience:** Employees enrolled in an FSA

**Subject:** FINAL REMINDER: Spend Your FSA Dollars by **[DATE]**

**Headline:** You can carry over **[$XXX]** to **[YEAR]**.

**Body:**

Hello [[member\_fname]],

It’s almost time for you to start using your new MyChoice® Flexible Spending Account (FSA)! We are excited about the updates and opportunities this new experience will provide.

Here are a few reminders about your new FSA account:

1. **If you haven’t used all the money in your [YEAR] FSA, you can carry over [Carryover Limit] to your new MyChoice FSA.**
2. **Before [PLAN YEAR START DATE], you’ll receive your new MyChoice**® **Account Visa® debit card** to use for all **[YEAR]** FSA-eligible expenses. Remember, you must activate your card and establish a PIN.
3. **On [PLAN YEAR END DATE], your current debit card will be deactivated.** Please destroy your old card once it’s been deactivated.
4. **Starting [PLAN YEAR START DATE],** **you can manage all FSA activities right in your benefits portal or from the MyChoice**® **benefits app**. Once activated, you can begin using your new MyChoice Account debit card for FSA-eligible expenses.

**Important:** To move any remaining **[YEAR]** FSA balance into your new MyChoiceAccount, a short hold will be placed on your old account in **[DATE]**. We’ll send you another reminder before that happens.

We hope you enjoy this updated account experience!

**[HR/Benefits Team Closing]**

# DCFSA Communications

## Final Reminder (No card)

**Audience:** Employees enrolled in a DCFSA

**Subject:** FINAL REMINDER: Submit Your Dependent Care Claims by **[DATE]**

**Headline:** Don’t lose your DCFSA dollars!

**Body:**

Hello [[member\_fname]],

It’s almost time for you to starting using your new MyChoice® Account! We are excited about the updates and opportunities this new experience can provide.

Here are a few reminders about your Dependent Care Flexible Spending Account (DCFSA):

1. **If you have any eligible dependent care expenses before the end of the year, you can get reimbursed using your [YEAR] account until [CLAIM END DATE].** To get reimbursed for these expenses, simply follow the current process.
2. **Starting January 1**, **you can manage all [YEAR] DCFSA activities right in your benefits portal or from the MyChoice® benefits app**, including submitting documentation and requests for reimbursements.

We hope you enjoy this updated account experience.

**[HR/Benefits Team Closing]**

## Final Reminder (With card)

**Audience:** Employees enrolled in a DCFSA

**Subject:** FINAL REMINDER: Submit Your Dependent Care Claims by **[DATE]**

**Headline:** Don’t lose your DCFSA dollars!

**Body:**

Hello [[member\_fname]],

It’s almost time for you to starting using your new MyChoice® Account! We are excited about the updates and opportunities this new experience can provide.

Here are a few reminders about your Dependent Care Flexible Spending Account (DCFSA):

1. **If you have any eligible dependent care expenses before the end of the year, you can get reimbursed using your [YEAR] account until [CLAIM END DATE].** To get reimbursed for these expenses, simply follow **[PRIOR VENDOR’s]** process to submit reimbursement claims manually.
2. **Use your [PRIOR VENDOR] debit card to pay for eligible dependent care expenses through [PLAN YEAR END DATE].** After that, your card will be deactivated, and you will only be able to submit manual reimbursement claims through **[PRIOR VENDOR]**. Please note that, like manual claims, you will be required to provide documentation for all debit card payments.

**Note:** Your debit card should only be used for expenses incurred in the current plan year. If your dates of service were incureed in the previous plan year, you will need to pay out-of-pocket and then submit a claim for reimbursement.

1. **Starting January 1**, **you can manage all [YEAR] DCFSA activities right in your benefits portal or from the MyChoice® benefits app**, including submitting documentation and requests for reimbursements.

We hope you enjoy this updated account experience.

**[HR/Benefits Team Closing]**

# Commuter Communications

## Transition to MyChoice Accounts Commuter Account (existing client)

**Audience:** Employees enrolled in a Commuter Account

**Subject:** IMPORTANT: Changes Are Coming to Your Commuter Account

**Headline:** Manage your account the same as your **[HSA/FSA]**!

**Body:**

Hello [[member\_fname]],

You are receiving this email because you are contributing to a parking or transit benefit in **[YEAR]**. We are transitioning these accounts to MyChoice® Accounts as of **[DATE]**. This means that you will soon be able to manage all your consumer accounts, including **[Health Savings and Flexible Spending accounts]**, from one place!

Here’s what you need to know about your Commuter Account as we make the change to MyChoice Accounts:

1. **Through [PLAN YEAR END DATE], use your existing [debit card/pass]** to make your transit and/or parking purchases.
2. **By [DATE], you’ll receive your new MyChoice**® **Accounts Visa® debit card** to use for all eligible transit and/or parking expenses, beginning **[PLAN YEAR START DATE]**. With this new card, you’ll be able to easily manage your Commuter Account, as well as any other savings or spending accounts you may have.

**Note:** If you are already enrolled in a consumer account through MyChoice Accounts and already have a debit card that you use for eligible purchases, you may not receive a new card. However, you will still be able to use the card for Commuter Account expenses beginning on **[PLAN YEAR START DATE].**

1. **Starting [PLAN YEAR START DATE], you can begin purchasing transit passes and/or pay for parking using the MyChoice Account debit card.** You will be able to manage your accounts directly from our benefits portal or the MyChoice® benefits app.

**Pro tip:** You can use your chip-enabled debit card at any ta-to-pay terminal. You can also add your card to your online or mbile transit provider to pay for monthly passes/bundles.

If you have a balance remaining in your **[PRIOR YEAR]** transit account as of **[PLAN YEAR END DATE]**, we will transition the balance to your new MyChoice Account. The balance transfer can take up to 60 days and will only be available for future purchases, so we encourage you to use any remaining **[PRIOR YEAR]** funds prior to the **[PLAN YEAR END DATE]** deadline.

We hope you enjoy this updated account experience.

**[HR/Benefits Team Closing]**

## Transition to MyChoice Accounts Commuter Account (new client)

**Audience:** Employees enrolled in a Commuter Account

**Subject:** IMPORTANT: Changes Are Coming to Your Commuter Account

**Headline:** A new Commuter Account administrator for a new year!

**Body:**

Hello [[member\_fname]],

You are receiving this email because you are contributing to a parking or transit benefit in **[YEAR]**. We recently announced that our benefits enrollment experience was changing as we have partnered with Businessolver® to provide you with a more robust benefits portal. As part of that transition, we are also transitioning administration of our Commuter Accounts to MyChoice® Accounts. This change, which will be effective **[DATE]**, will allow you to access not only your benefits information, but also your Commuter Account details, all from one place!

Here’s what you need to know about your Commuter Account as we make the change to MyChoice Accounts:

1. **Through [PLAN YEAR END DATE], use your existing [debit card/pass]** to make your transit and/or parking purchases.
2. **By [DATE], you’ll receive your new MyChoice**® **Account Visa® debit card** to use for all eligible transit and/or parking expenses, beginning **[PLAN YEAR START DATE]**. With this new card, you’ll be able to easily manage your Commuter Account, as well as any other savings or spending accounts you may enroll in.
3. **Starting [PLAN YEAR START DATE], you can begin purchasing transit passes and/or pay for parking using the MyChoice Account debit card.** You will be able to manage your accounts directly from our new benefits portal or the MyChoice® benefits app.

**Pro tip:** You can use your chip-enabled debit card at any ta-to-pay terminal. You can also add your card to your online or mbile transit provider to pay for monthly passes/bundles.

If you have a balance remaining in your **[PRIOR YEAR]** transit account as of **[PLAN YEAR END DATE]**, we will transition the balance to your new MyChoice Account. The balance transfer can take up to 60 days and will only be available for future purchases, so we encourage you to use any remaining **[PRIOR YEAR]** funds prior to the **[PLAN YEAR END DATE]** deadline.

**Important Dates to Know**

* **You have until [PLAN YEAR END DATE] to use your existing [debit card/pass] for eligible transit and/or parking expenses.** After **[PLAN YEAR END DATE]**, your **[card/pass]** will be deactivated.
* **Beginning [PLAN YEAR START DATE], you can use your new MyChoice debit card to pay for any eligible transit and/or parking expenses.** You can also submit claims for reimbursements for parking expenses. **Note:** You have **180 days** from the date of service to request a parking reimbursement.
* **Between [DATES], any funds left in your [Prior Vendor] Commuter Account will be transferred to your new MyChoice Account.**
* **On [DATE], your previous balance will be reflected in your new MyChoice Account and is available to use for eligible transit and/or parking expenses.** However, to ensure a smooth transition, we do recommend that you spend down your previous balance by **[PLAN YEAR END DATE]**.

If you have a balance remaining in your existing **[YEAR]** transit account on **[PLAN YEAR END DATE]**, we will transition the balance to your new account. The balance transfer can take up to 60 days, so we encourage you to use any remaining funds prior to the **[PLAN YEAR END DATE]** deadline.

We hope you enjoy this updated account experience.

**[HR/Benefits Team Closing]**

# Appendix A: Document Revision History

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Version | Date of Update | Updated by | Requested by | Summary |
| XX | XX | GenX  | 10/11/2023 | FirstInitialLastName (jdoe) | FirstInitialLastName (jdoe) | * Summary statement of what was updated. Or, if draft a completely new document, type “Net new document.”
 |
|  |  |  |  |  |
| 1.01 | 7/9/2024 | SRotondo | Sjones, ALakowske, HDoyle | * Updates based on stakeholder view and Design QC
 |
| 1.02 | 6/19/2024 | SRotondo | Sjones, bxrobinson | * Updates based on stakeholder review
 |
| 1.03 | 5/21/2024 | SRotondo | Various | * Updates based on QC
 |
| 1.04 | 5/1/2024 | SRotondo | SJones | * Created guide from various email templates
 |
| 1.05.N/A | 7/30/2024 | Cstark | Sjones | * First published to toolboxes.
 |
| 01.06.N/A | 1/28/2025 | Cstark | Svidoni/mmaines | * Added call-out promoting the Tech with Heart Resources site.
 |
| 1.07.N/A | 5/1/2025 | Cstark | Cstark | * Added info for EE/Dep Preferred Names and link to related document.
 |

Versioning Control Convention Explanation and Example for Reference only

Style the Version history with xVersionNotes. Style the other fields with xDocRevHit.

|  |  |  |
| --- | --- | --- |
| 00 | 00 | Topic Based Version |
| First number. Whole number. Advance to next number after a major content update. (E.g., template update, complete overhaul of content) | Smaller updates (E.g., adding a new section, updating content to accommodate a new feature)If a major update of an aspect of the document, go to 2.0 | Gen1Gen2 (Most current) |